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ABSTRACT

Channeling of public interest and putting it to work on a clearly structured course can make a major contribution to successful school-community work in educational planning. Through anticipation of problems, schools are often able to furnish solutions before a problem arises. Educational planning involves evaluating the educational opportunities available, determining the changes to be made, and projecting a plan of action. Self evaluation and an educational survey will help in identifying educational and facility needs. Adopting and implementing a plant improvement program should be initiated if educational and facility needs have been identified. Such a program should provide for selection and employment of specialists, preparation of educational specifications, development of preliminary architectural plans, and acceptance by the public. (Author/MLF)

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EDUCATIONAL PLANNING

(Putting Public Concern to Work)

by

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EDUCATIONAL PLANNING: PUTTING PUBLIC CONCERN TO WORK

Boards of education and school administrators continuously feel many pressures from various sources, all nominally seeking "better" and "more efficient" education.

Converting this pressure—or interest—into useful energy for support of education is a main responsibility of school people. A main tool for the school people to use is information to and from our public. Information is a two-way process. We want to know all about our school community, and we want our public to know all about our educational program and needs. Understanding and a seeking of common goals build constructive teamwork. Misunderstanding and lack of information on any side build damaging pressure. Channel public interest, put it to work on a clearly structured course, and you have made a major contribution to successful school-community work in educational planning.

Compromise and conciliation is a part of any group work. Goals held only by one or a few individuals will not go far. Education as a product of group activity demands group goals, even when it provides for the greatest individuality of instruction and growth of each pupil. Stress on the importance of the individual can and should be a group goal. But every individual interested in prosperity of the schools should be willing to serve on a team as a teamworker.

INVOLVE PEOPLE

What can you do with a worried individual who feels forsaken in his pet interests? Put him to work. Find his talents and find a way to keep him busy producing useful work. Find his opposite, an individual or group with opposing views, and have both sides explain their reasons, for better understanding of one another, and for work toward a final decision from the overall group to represent the best elements of all opposing views.

Few problems relating to school-community cooperation in educational planning are solved once for all times. The problems arise again in future generations or in different situations and applications. Few school-community problems solve themselves. A main tool in converting community pressures to useful energy is participation. Work relieves tensions and develops knowledge and understanding of school and community needs and goals.

ANTICIPATE PROBLEMS AND SOLUTIONS

Many problems and pressures would not exist if planning, in all its aspects, had been done properly in times past. Another main tool for putting pressures to work is anticipation. School people anticipate many problems before they develop. They could anticipate more by consciously looking for incipient problems in the school and in school-community relations. One method is to keep up with your professional literature, reading selectively, learning about problems that have come to light and have been solved in other schools. Membership in professional organizations and attendance at professional meetings and workshops is another method of developing the ability to anticipate problems and pressures. Self-analysis and evaluation by a school staff are extremely effective in finding beginning problems, when properly conducted. Visiting consultants can be used at the school, and administrators, teachers, and others concerned can visit in other schools to learn about problems. Through anticipation, schools often are able to furnish solutions before a problem arises. This accomplishment is the acme of good planning. This is the kind of planning we are looking for.

To take a few examples of problems that can be anticipated: Will enrollment skyrocket because of a new industry coming to your school district? Or because

of a new housing development or a trailer park now being constructed? What are the career interests of most new residents who will come into your district? Are they professional people calling for more precollege offerings? Or are they skilled craftsmen caught by technological changes who will want their children to have opportunity for both precollege and prevocational trade training? Does your county or city government have its financial house in order with definite plans for raising needed funds for better schools? How well have you kept your governmental officials and the general public informed on school programs and plans? And how well have they kept you informed of their plans and aspirations for you, and of their ability and intentions to support their school programs? If the tools of information, participation, and anticipation are properly at work, you know the extent and limits of future community support and pressures in considerable detail. You know about all that can be known without a crystal ball.

Underlying all overt effort for good school-community planning cooperation is a spiritual dedication and a willingness to serve rather than to be served, throughout the adult community, for the good of the school children.

THE EDUCATIONAL PLANNING PROCESS

Having covered some of the main aspects of the work of school and community planning for education, let's take a look at the structure of educational planning.

What is educational planning? The total process involves evaluating the educational opportunities available, determining the changes to be made, and projecting a plan of action which should be undertaken. Therefore, it is a

comprehensive process that includes the following main elements, each complicated and detailed in its own right:

1. A curriculum study
2. A survey of facilities and programs
3. Improvement of the instructional program
4. Preparation of educational specifications for any new school plant facilities or renovations and additions
5. Selection of any needed furniture and equipment
6. Planning, construction, and inspection of new plant facilities or renovations or additions
7. Collaboration by and orientation of the school staff and students
8. Evaluation of the results of each improvement program

Educational planning is a logical mating of goals with resources. It is comprehensive, attempting to relate all elements of school operations to one another for a more orderly and less emotionally motivated expenditure of resources than would result from isolated attack on each school problem.

Planning of whatever nature is becoming increasingly difficult and complex as the number of possible choices becomes greater. Business and industry, in looking towards future development, must necessarily consider an enormous number of factors. Cities and regions, in planning for the needs of concentrated populations, must look at and evaluate a vast variety of imponderables. Even in our personal lives, the large number of choices open to us may well lead to indecision, tension and frustration. But the facts which make planning more difficult also make it more important. Therefore, just because it is difficult is certainly no reason to avoid the task of better planning.

WHO DOES IT?

Educational planning involves people of diversified interests, skills and knowledges. Since the process is basically an educational problem, it involves primarily persons of the profession.

Persons involved in educational planning are the teaching and nonteaching staff members of the school; pupils, especially at the secondary level; the board of education; the citizens of the community; educational consultants; the architect; the engineer; the landscape architect; the school attorney; the staff of the state department of education; and, staff members of the education departments of colleges and universities.

Each of these groups of people has definite responsibilities with regard to the identification and the solution of the educational planning problem. The school superintendent is responsible for the development of educational planning, although he may delegate this responsibility. Such action does not violate a basic principle of educational administration, the centralization of responsibility. Responsibility should be centered in the school administrative body, under the leadership of the superintendent.

How do we plan for the future? What are the steps and what appears to be their logical sequential order? The educational planning process falls into three distinct and separate steps. These steps are (1) identifying and analyzing educational and facility needs, (2) adopting and implementing a plant improvement program, and (3) completing and evaluating the educational planning process.

STEP 1

Determining educational needs and solving educational problems—these are the heart of the process. These needs will determine the instructional program and the staff, which in turn point the way to the appropriate solution to the

facility problems. This first step, identifying and analyzing educational and facility needs, should involve a determination of trends, objectives, facility needs, and the content of the total educational program. These aims may be accomplished through a self-evaluation and an educational survey.

SELF-EVALUATION

Self-evaluation is a local study that may use the advice, counsel and assistance of the consultant. Its purpose is to determine a system-wide educational program by analyzing the needs and evaluating how well those needs are being met. In making the self-evaluation study, all factors in the community affecting the educational program should be studied.

Elements intricately involved in educational planning are the community history, traditions, culture, geography, economy, pupil population and migration in and out of the school administrative area, changes in district lines, and the presence of nonpublic schools.

Self-evaluation in the school will include teaching and nonteaching staff members' qualifications and experience, their education and professional improvement programs, and achievements of pupils in the school and of former pupils after they complete the school program. In addition, those former pupils who failed to complete the required program for graduation should be studied. This study should include information on why they failed, what they are doing, and what they need now.

Since there is a direct relationship between the school and the community, the educational program should be studied to determine how it can fulfill its proper place in society. Does the educational program of the school, for example, meet its obligation with its interrelationships, such as the school's relations to the community library, cultural activities and organizations, health and

welfare programs, and recreational and public entertainment activities? What are the community attitudes toward nursery schools, kindergartens, special and vocational education, and adult and higher education? These and similar questions must be answered.

THE EDUCATIONAL SURVEY

The educational survey is an efficient and professional means of evaluating educational needs. It should involve an authoritative, realistic, thorough and objective appraisal of all factors that influence a complete educational system. The educational survey does not duplicate the self-evaluation study, because it evaluates and utilizes the findings of that study. In addition, it suggests ways of comparing existing programs and facilities with needs and recommends a plan of action to provide for the differences.

Although a few of the larger school systems may have qualified staff personnel to perform the educational survey, there is considerable merit in securing the services of people from outside the community. Specialists who are trained in providing this type of advisory service lend objectivity to the solutions and are an asset to the study.

A comprehensive educational survey studies all areas of school administration. It reviews the program offerings to determine their depth and scope; the administrative and supervisory policies; the adequacy of the present staffing program; the population trends of the school and the community; the location and organization of schools; the methods employed in teaching; and the operating procedures and policies.

Transportation is always a consideration in long-range educational planning. Such factors as geographical limitations; state, county and district boundary lines; street and road systems and traffic routes must be considered in projecting a plan for the future .

Consideration of the school plant needs is imperative. Existing school plants should be evaluated in terms of educational adequacy, structural condition, environmental limitations, location, pupil capacity, site development, utilization possibilities and many other items.

An analysis of the economic situation with regard to financing the school program is a factor to be considered in the development of a plan for the future. It is important to determine the relationship of local effort to the economic potential. Although an idealistic approach to providing for the needs of the future is desirable, the practical approach is sometimes required in an effort to stay within the financial limitations.

STEP 2

The second step, adopting and implementing a plant improvement program, should be initiated if educational and facility needs have been identified. This program should provide for selection and employment of specialists, preparation of educational specifications, development of preliminary architectural plans, and acceptance by the public.

SERVICES OF THE SPECIALISTS

A main key to successful planning is the diligence of the specialists who provide expert advice, assist in the development of wholesome relationships, and counsel towards satisfactory solutions.

The educational consultant can provide assistance to local administrative units if his selection has been based upon sound qualifications. Such qualifications should include a knowledge of all phases of educational planning and a comprehension of teaching methods. He should have had a diversified educational experience and have acquired both a sound basic educational concept and familiarity

with the latest educational theory. His experience and ability to evaluate school plants are very important qualifications.

One specialist, the architect, may be considered the greatest single contributor to a successful plant improvement program. His experience and creative ability in solving problems will smooth the way for effective school-community teamwork in providing needed facilities for present and foreseeable needs. Many factors should be taken into account in the selection of an architect. His professional integrity and willingness to cooperate, his vision, imagination and artistic judgment, as well as his knowledge of design techniques, are most important in working with those responsible for planning new facilities. The amount of actual school construction experience, the capacity of his firm and the source of engineering services are not to be overlooked.

The services of another specialist, the legal consultant, should be acquired if the school administrative unit does not have a regularly employed school attorney. He should assist with the legal aspects of the plant improvement program. His most obvious responsibilities will be to review all contracts and to validate all legal descriptions.

PREPARATION OF EDUCATIONAL SPECIFICATIONS

Educational specifications for plant construction or renovation should describe thoroughly and concisely the activities to be housed, the nature of the people involved, the spatial relationships of the school plant to the site, the interrelationships of instructional areas with one another and with non-instructional areas, the equipment and furniture to be used, and any special provisions which deal primarily with the environmental conditions for pupil development and learning and for staff efficiency in the school plant.

Educational specifications are precisely what the name implies—with emphasis upon educational. Educational specifications are clearly separate from architectural specifications. The great need of architects is not for advice on architecture, but for advice on the functions and activities projected for a new school plant. Since the emphasis in the "ed specs" should be upon how teaching will take place, the persons responsible for their development should be members of the staff who will use the proposed facilities. It is not wise to use people who don't know anything about the teaching methods for a given area of instruction. A "job description" analysis of each function or subject is required. Therefore, qualified staff personnel must be utilized to develop the educational information which will be transferred into architectural drawings.

What are the general characteristics of educational specifications for a school plant? Educational specifications for a proposed school plant should—

1. Describe the total school program and the facilities needed in the school program.
2. Fit a predetermined instructional program.
3. Stimulate creative thinking and cooperative effort to provide functional facilities with favorable climate for intelligent communication.
4. Be free of architecturally rigid prescription, and leave the design methods to the architect.

What should be the contents of educational specifications? Every school system should have a written philosophy of purpose and a statement of the objectives of the school program. Such a statement is important to the design professions; therefore, it should be included. A simple, concise and brief statement that is free from pedagogical terminology is an asset to the total improvement program.

The architect needs to know many things about the community that he is to serve. Such items as the level of educational achievement, the employment opportunities, the median family income, the population trends, the available community services, and the attitudes of people are examples.

Information about the school system and its services are valuable in understanding the total situation. First, it may be wise to include a statement about the board of education members, who they are, what they do, and how they are selected. Second, information about the administrative organization and proposed or possible changes would be helpful. Third, what has happened to the school population during the past few years and what is anticipated for the future? The last item to be considered as a part of the school system information might be a statement summarizing the school finance situation. Although economic limitations should not restrict good planning, the design people can profit from having a thumbnail sketch of the financial potential.

Another piece of material that may be considered a part of the background information in a set of "ed specs" deals with the school facility program. This includes statements about the school construction program. Such an occasion provides the opportunity for school people to state their past construction experiences. Most of these experiences will have dealt with environmental factors, such as acoustical, thermal, visual, and materials and finishes. Although such information should be communicated, a word of caution—don't let it rigidly prescribe the architectural and engineering solutions.

Both the design professions and members of the study committee need to know some of the specifics about the proposed improvement program prior to commencing their task. Descriptions of the following are imperative:

- Characteristics of the school
- Nature of the curriculum offering
- Requirements in terms of capacity and occupancy
- Type of school organization
- Identification of the special programs to be housed

Each identifiable activity space should be treated with reference to the following seven factors:

- Philosophy and objectives
- Activities to be housed
- Persons to be accommodated
- Space requirements
- Spatial relationships
- Equipment to be housed
- Special environmental provisions

An activity space is not restricted to teaching stations per se but includes custodial, food services, and administrative spaces. Let's look at each of these items in greater detail.

The first ingredient is a simple, concise and brief statement about the philosophy and objectives of the activities to be housed in the space under study.

Second, what kinds of activities are to be housed? Such a statement is very important because what happens in a space will affect the design. This is the most important part of the "ed specs." It should be considered as a

job description analysis. Therefore, all activities should be identified. For example, a statement that pupils and teachers experiment will not suffice because many architects will not know in detail what happens when this experimentation takes place.

Third, who will be accommodated in the facilities? This statement can be brief, as long as it presents the pertinent facts. The number of pupils, the number of teachers, and the optimum class size are suggested responses.

Fourth, what are the space requirements? It is not intended that a precise statement of measurement be given. Rather quantitative facts in terms of types and numbers of rooms and sizes of spaces should be recorded. Under some circumstances it may be desirable to state in approximate terms the square foot requirements. If the architect is as good as he ought to be, the school people should not be required to give precise linear measurements for requirements.

Fifth, what are the spatial relationships of this facility under study to other spaces? The relationships of facilities for one instructional program with other programs both indoors and outdoors should be stated. For example, is it important that the language arts facilities be located close to the learning resources library? If so, a brief sentence stating this relationship should be recorded.

Sixth, what types and kinds of equipment affect in a major way the design of the space? The furniture and equipment should fit the proposed educational activities. Rigid requirements and restrictions on size, layout, scale and brand names should be avoided.

Seventh, are there special provisions that are unique to the space under study? Special provisions include any environmental treatment that improves the utility of the facility. For example, the drafting classroom, due to the detailed nature of the classroom activity, may require a high intensity of illumination. If so, the need for additional illumination should be indicated.

ARCHITECTURAL PLANNING

The development and evaluation of preliminary architectural plans is next in the educational planning process. Using the educational specifications and the site information as a guide, the architect confers with local school officials and prepares interpretative preliminary studies and cost estimates.

A reasonable and realistic time schedule should be worked out cooperatively between the school officials and the architect prior to the preparation of any plans and specifications. As soon as the preliminary studies and drawings have been completed, the architect should estimate the cost of the project. This estimate should provide a basis for the development of a realistic budget. The estimated cost of an improvement program should provide a basis for determining the amount of funds required to complete the improvement program.

PUBLIC ACCEPTANCE

A continuous, well-planned, long-range public relations program is an important and integral part of effective investigation, planning and financing. Since the public schools belong to people, the people are entitled to know of future plans. Complete and honest information should be presented. Remember that the educational program is the only justification for a new facility. To merit the cooperation and assistance of individuals and community groups, the school officials must keep them informed.

In the promotion of good public relations, the maximum practical use of all available media of communication is a must. The time and use of each medium depends upon local situations. Some effective presentations are open house and school displays. Radio and television news reach others in a community. Civic groups usually welcome appearances of school officials to describe school activities and needs.

STEP 3

The completion of the educational planning process for a new school plant or renovation is not when the building has been planned. Many tasks remain for the school staff at this stage. The third and final step of educational planning includes the completion and evaluation of the planning process.

During this step many important and significant tasks remain for the school staff. For example, responsibility for the development of final plans and specifications, as well as construction and inspection of new facilities, needs to be placed with the design professions. The selection of equipment and furniture should not be overlooked. An equally important phase is the utilization and evaluation of the new facility. The utilization includes orientation of the staff to the new facility and its presentation to the public.

PREPARATION OF FINAL PLANS

Since the preparation of final plans and specifications is detailed and technical, the architect should obtain approval prior to beginning the final design work. Approval may be the result of a favorable vote of the citizens on a bond proposal or, if voter approval is not necessary, through action of the responsible school officials.

Additional information is needed by the planning professions prior to the development of the final plans and specifications. These data which supplement the educational specifications should be obtained through cooperative effort of all planning parties, particularly the school officials and the architect. This action should assist in determining solutions, eliminate misunderstandings and produce a durable facility. As an example, a description of each space should be discussed by all planning parties and recorded to avoid the possibility

of omission of detail at a later date. Such a record should include details that may have been stated previously in a general manner. The shape of the space, the use and control of illumination, the type and kind of equipment to be used, the type of mechanical and electrical systems, the wall, floor and ceiling finishes, and the utility services are some items to be considered. A conference at this stage provides the opportunity for the school people and the specialist to get together and share their experiences with various types of materials, finishes, equipment, and environmental systems.

It is advisable to put into writing any information that affects the quality of construction. Its gathering and recording is again the shared responsibility of all planning officials. It should be considered as supplemental material for the purpose of improving the quality of the facility. It should serve as a guide to the character of construction, the installations, and the finishes. Where necessary, suggested types, sizes and brand names may be recorded.

The final plans and specifications should not be submitted to bidders until the school officials have given formal approval to the plans and specifications. Local school officials should take sufficient time to review final plans and specifications prior to their approval. Due to the technical nature of the plans, the architect should prepare a brief summary in an effort to expedite an understanding of their contents.

SELECTION OF FURNITURE AND EQUIPMENT

Careful selection of furniture and equipment can make a great contribution to the educational utility of the new facility. This phase of planning is vital and should parallel the architectural planning. Also, the identification of furniture and equipment should have been a consideration during the development of the educational specifications. The selection and purchasing of furniture is

the responsibility of the school officials, because it must be compatible with the proposed educational activities. The type of furniture and equipment selected will affect the design. All furniture and equipment must be functional, flexible in use, efficient and durable, and should add aesthetically to the relationships of space, color and form.

COMPLETE AND USE

The success of any improvement project is dependent upon the manner in which it is completed and used. Too often, projects are neglected by school officials once the contracts have been awarded. Although the architect may have the responsibility for supervision of construction, the project must be inspected by the architect, the engineer and the school officials prior to acceptance. This inspection covers, in addition to the quality of the workmanship, compliance with the architectural and engineering specifications.

Effective use of the new facility is a challenge. Before occupying a building, the school staff should plan for effective use of new facilities, including equipment. An in-service program on how to use the new facility should include all parties that were involved in the planning—especially the educational consultant, the architect, the engineer, the equipment manufacturer's representatives and many other specialists.

The school should keep the citizens fully informed of the educational advances being made in the new plant. Therefore, some method of promoting citizen satisfaction is encouraged. A well-planned dedication program and an open house tend to build good public relations and increase public awareness and pride in their schools and community. Other programs with the public invited, published news with pictures, and oral and written reports are effective.

EVALUATION OF THE PROGRAM

The final test of any improvement program is how well it performs. Therefore, it is suggested that special emphasis be placed upon evaluations and improvements in the school program after occupancy of a new plant. The evaluation should cover (1) instruction, (2) activities in which pupils and teachers engage, (3) materials and equipment used, and (4) emotional reactions of boys and girls to the environmental conditions, as major elements. Also, the evaluation should provide information and ideas for improvement in future planning. The practical solution to keeping abreast of the changes is through evaluation. Chronologically, the evaluation phase is last, but this is not to imply that it is least important.

The final test is what happens to children. If the pupils are pleased, satisfied, and inspired, then credit may be taken for a job well done.